

Using MYOB at Christmas time

Christmas can be a very busy time of year and can often present unique challenges and particular procedures for your small business.

For example, you may like to take the opportunity to send a Christmas or New Year's greeting to your valued customers. To do this easily, you can use your MYOB software to create and personalise a greeting template, group your recipients into a specially-created Christmas mailing list and then print your letters.

Additionally, during the holiday period you may also need to know how to process and pay your staff's leave; you may also have staff members who enquire about their current leave balance. You may even need to pay your staff in advance for the time they are on leave.

Within this PDF document, you'll find a number of tips and tricks specifically designed to help you with the procedures described above. And don't forget, the information you find here can be applied to other areas of your business throughout the entire year.

We hope you'll find these tips both useful and easy to follow and look forward to bringing you more soon.

Mailing a Christmas greeting to your contacts

The following tips are suitable for MYOB Accounting, MYOB Accounting Plus, MYOB Premier and MYOB Premier Enterprise. Microsoft Word or Microsoft Office is also required.

At this time of year, many small businesses like to send their customers a greeting card, which may contain a thank-you message or serve as a reminder to your customers that you are thinking about their business, even if you haven't heard from them for a while.

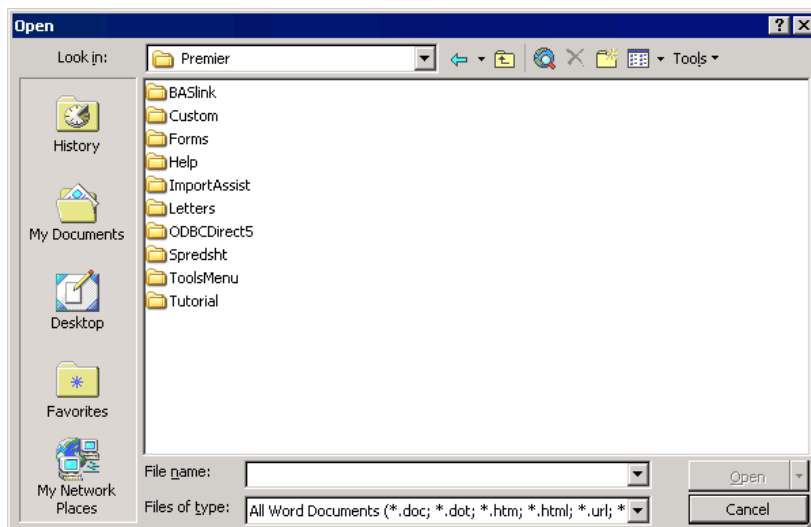
Sending out these types of messages involves creating a letter template, setting up a Christmas mailing list, and then printing your personalised letters. Finally, you'll need to print out your mailing labels.

The following section sets out procedures you can follow if you'd like to send your customers a Christmas greeting.

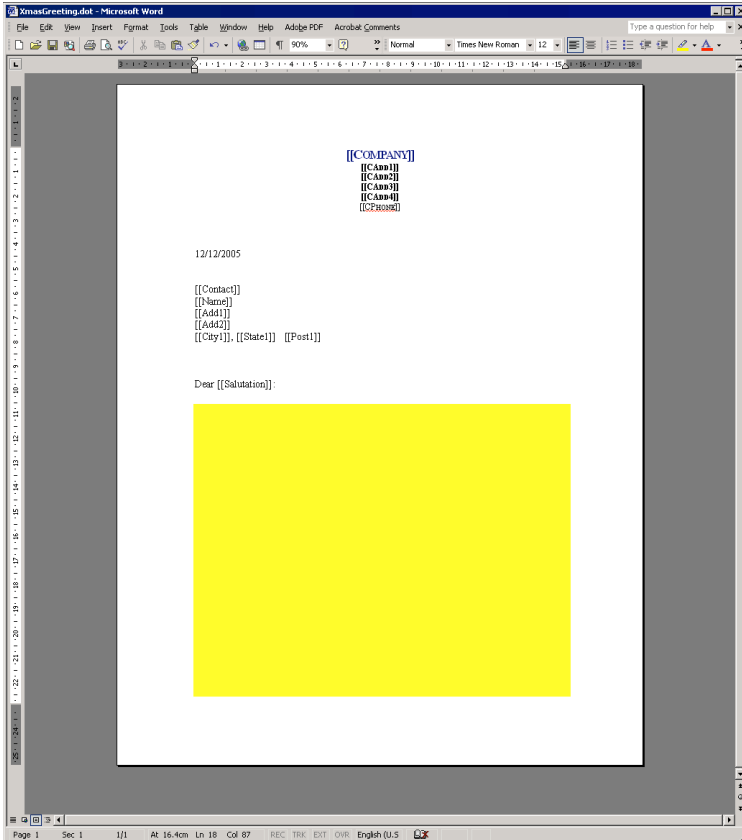
Personalised Letters

Step 1: Create a letter template

- 1) In Microsoft Word go to the **File** menu and choose **Open**. The **Open** window appears.
- 2) Click the **Look In** drop-down button and select **Local Disk (C:)**.
- 3) Locate and open your MYOB application folder (for example, c:\Premier).



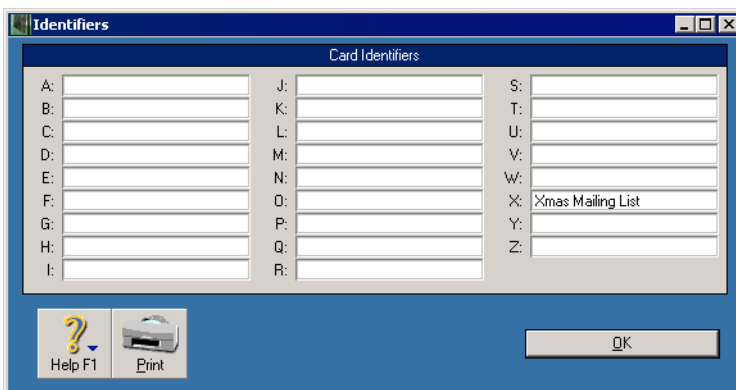
- 4) Open the "Letters" subfolder and double-click the "Blank.dot" file.
- 5) Go to the File menu and choose Save As. The Save As window appears.
- 6) Change the file name to read XmasGreeting.**dot** and save it in the Letters folder.
- 7) Type your message in the area that is highlighted in yellow below. To avoid mail merge problems, don't change any of the fields in brackets or the date, as these will automatically update when printing the letters.



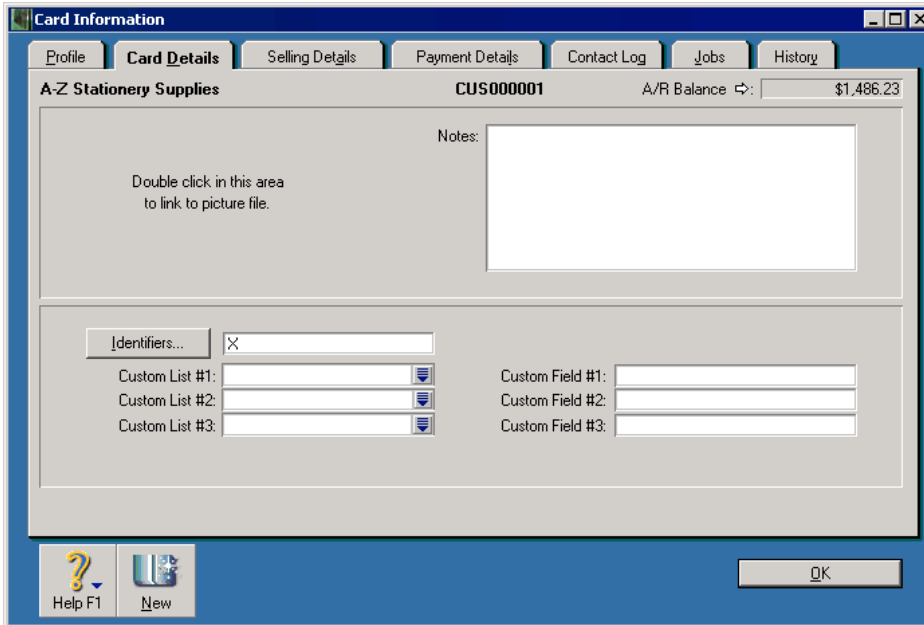
- 8) Add any other elements to the letter as you like, for example, your company logo.
- 9) Save the letter when you have finished typing and formatting your message.

Step 2: Create a Christmas mailing list

- 1) In your MYOB accounting software, go to the **Lists** menu and choose **Identifiers**. The **Identifiers** window appears.
- 2) In the **X** field, type **Xmas mailing list** and then click **OK**.



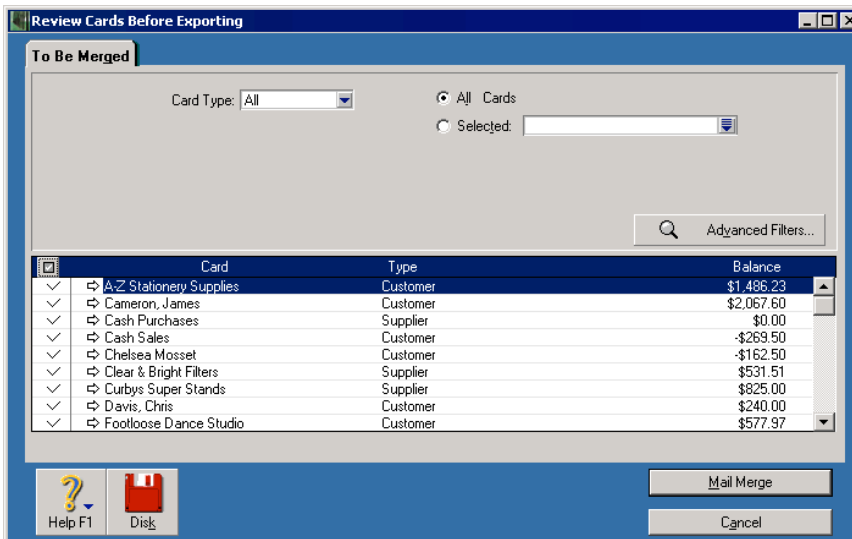
- 3) Go to the **Card File** command centre and click **Cards List**. The **Cards List** window appears.
- 4) Open the card of a contact you want to include in your Christmas mailing list.
- 5) Click the **Card Details** tab, enter **X** in the **Identifiers** field and then click **OK**.



- 6) Repeat step 5 for each other contact you want to include in your Christmas list and then close the **Cards List** window.

Step 3: Print the personalised letters

- 1) Go to the **Card File** command centre and click **Create Personalised Letters**. The **Review Cards Before Exporting** window appears.
- 2) Select who you would like to print personalised letters for.
To only select the contacts you have marked with the **X** identifier, click **Advanced Filters**, type **X** in the **Identifiers** field and then click **OK**. The **Review Cards Before Exporting** window appears showing only the contacts that you have selected to be part of your Christmas mailing list.




- 3) Click the **select** icon () to select all listed contacts and then click **Mail Merge**. The **Select from List** window appears.
- 4) Select the XmasGreeting.dot template in the list and click **Use Template**. The personalised letters for each selected contact appears in Microsoft Word.

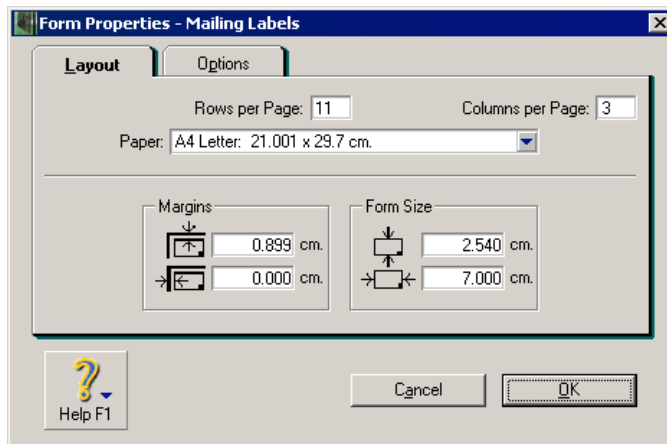
- 5) Review and print the letters using Microsoft Word.


For more information about sending personalised letters using your MYOB software, see **Support Note 1506 – How to use MYOB OfficeLink with Word.**

Mailing Labels

Step 1: Create a mailing label template

- 1) In your MYOB accounting software, go to **Card File** command centre and click **Print Mailing Labels**. The **Review Labels Before Printing** window appears.
- 2) Click **Advanced Filters** if the **Advanced Filters** window has not opened automatically.
- 3) In the **Selected Form for Mailing Label** field, select the format that best matches your mailing labels sheets and then click **Use Forms**. If none of the existing formats match your sheets, select any format.
- 4) Click **Customise**. The **Customise Mailing Labels** window appears.
- 5) Click the **Form Properties** icon () in the customisation toolbar. The **Form Properties – Mailing Labels** window appears.



- 6) Enter the number of rows and columns that are on your label sheets.
- 7) Ensure that the actual paper size of your sheets of labels is selected in the **Paper** field.
- 8) If there are any top or left-side margins on your label sheets, enter these dimensions into the **Margins** fields
- 9) Enter the dimensions of a single label in the **Form Size** fields.
- 10) Click **OK**. You can now format the label area as you like. You can also add additional fields by clicking the **Data Fields** icon () in the customisation toolbar.
- 11) Click **Save Form** and then click **OK**. If the **Save As** window appears, enter a name and description for the mailing label template and then click **OK**.

Tip: To test the layout of your mailing labels, insert a plain piece of paper in your printer and then click **Print Alignment Form** in the **Advanced Filters** window.

Step 2: Print the mailing labels

- 1) Go to **Card File** command centre, click **Print Mailing Labels** and then click **Advanced Filters** if the **Advanced Filters** window does not open automatically.
- 2) If you only want to print mailing labels for the contacts you have marked with the **X** identifier, type **X** in the **Identifiers** field.

- 3) Ensure that the mailing label template you want to use is selected in the **Selected Form for Mailing Label** field and then click **OK**.
 - 4) Click the **select** icon () to select all contacts in the list or manually choose which contacts you want to print labels for by clicking in the **select** column next to their names.
 - 5) Click **Print** to print the mailing labels.
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Handling holiday leave queries and payments

The following tips are suitable for MYOB Accounting Plus, MYOB Premier, MYOB Premier Enterprise and MYOB AccountEdge.

Traditionally, many employees use the summer months to take their annual leave. This may mean that your business will need to understand how to process any requests for leave that your employees make.

If you'd like comprehensive payroll training, you can book into our "Managing your payroll with MYOB accounting software" course to learn all you need to know.

What's more, we are offering a special bonus for all attendees during summer.

Simply enrol and pay for any classroom-based MYOB Training course over summer (offer ends 31 January 2006) and you can choose to receive either a 256MB USB-drive or a double movie pass.

For more information, visit MYOB Training today at www.myob.com.au/training .

Alternatively, by following the procedures outlined in this section, you'll learn how to process leave-related requests in the coming holiday months.

To check your employees' entitlement balances

- 1) Go to **Reports** menu and choose **Index To Reports**.
- 2) Click the **Payroll** tab and double-click **Entitlements - Balance Detail**. The Entitlement Balance [Detail] report appears (if the **Report Customisation** window appears, click **Display**).
- 3) Select **Lifetime** in the **Period** field. The report updates to reflect your employees' current entitlement balances.

Report Display

Period: Lifetime Redisplay View: Print Preview

Clearwater Pty Ltd

Entitlement Balance [Detail]

Lifetime Page 1

Employee	Hours	Value
Jones, Mary EMP00001		
Holiday Leave Accrual	20.73	\$498.32
Sick Leave Accrual	12.73	\$306.01
Total:	33.46	\$804.33
Long, Alan EMP00002		
Holiday Leave Accrual	20.05	\$578.37
Sick Leave Accrual	8.05	\$232.21
Total:	28.1	\$810.58
Parker, Peter EMP00003		
Holiday Leave Accrual	10.05	\$193.27
Sick Leave Accrual	10.05	\$193.27
Total:	20.1	\$386.54
Smith, Sue EMP00004		
Holiday Leave Accrual	25.05	\$963.46
Sick Leave Accrual	10.05	\$386.54
Total:	35.1	\$1,350.00

Help F1 Print Send To Customise Save As Close

<entitlement_report.tif>

To pay holiday leave in advance

Assume you pay your employees on a weekly basis. In the next pay run you want to pay them one week of standard pay (40 hours, \$750 gross) plus two weeks of holiday pay (80 hours, \$1,500 gross):

- 1) Go to the **Payroll** command centre and click **Process Payroll**. The **Process Payroll** window appears.
- 2) Select whether you want to pay several employees or an individual employee, and then enter the payment date.
- 3) Select the **Pay Leave In Advance** option. The **Leave In Advance** window appears.

Leave In Advance

Enter the number of weeks in this pay:

Weeks of standard pay:

Weeks of leave in advance:

Total weeks in this pay: 1

- 4) Leave the value showing in the **Weeks of standard pay** field as **1**.
- 5) Enter **2** in the **Weeks of Leave In Advance** field and click **OK**.
- 6) In the **Pay period start** and **Pay period end** fields, enter the three-week date range that will be paid for in the pay run.
- 7) Click **Next**. The **Select & Edit Employee's Pay** window appears.
- 8) Click the zoom arrow next to the first employee's name. The **Pay Employee** window appears.
- 9) If the employee is paid:
 - **on an hourly basis:** The **Base Hourly** category displays 120, which is equal to the number of hours payable for the three pay periods. Enter 80 hours in the **Holiday Pay** wage category and reduce the **Base Hourly** hours to 40.

Employee ⇄: Jones, Mary		Cheque No.: Auto #	
Statement Text: PAY FOR 22/12/2005		Payment Date: 22/12/2005	
Banking Details...		Pay Period Start: 16/12/2005	
Memo: Paycheque		Pay Period Ending: 5/01/2006	
Net Pay: \$1,566.00			

Payroll Category	Hours	Account	Amount	Job
Base Hourly:	40	6-5100 Wages & Salaries	\$750.00	
Holiday Pay:	80	6-5100 Wages & Salaries	\$1,500.00	
Sick Pay:	0	6-5100 Wages & Salaries		
Union Fee:		2-1540 Union Fees Payable		
Salary Sacrifice:		2-1530 Superannuation Payable	-\$300.00	
PAYG Withholding:		2-1510 PAYG Withholdings Payable	-\$384.00	

Already Printed Number of Pay Periods: 3

- **on a salary basis:** The **Base Salary** category displays \$2,250, which is equal to the gross wages payable for the three pay periods. Enter 80 hours in the **Holiday Pay** wage category (\$1,500 appears in the **Amount** column) and reduce the **Base Salary** dollar amount to \$750.

Employee ⇄: Jones, Mary		Cheque No.: Auto #	
Statement Text: PAY FOR 22/12/2005		Payment Date: 22/12/2005	
Banking Details...		Pay Period Start: 16/12/2005	
Memo: Paycheque		Pay Period Ending: 5/01/2006	
Net Pay: \$1,566.00			

Payroll Category	Hours	Account	Amount	Job
Holiday Pay:	80	6-5100 Wages & Salaries	\$1,500.00	
Sick Pay:	0	6-5100 Wages & Salaries		
Base Salary:		6-5100 Wages & Salaries	\$750.00	
Union Fee:		2-1540 Union Fees Payable		
Salary Sacrifice:		2-1530 Superannuation Payable	-\$300.00	
PAYG Withholding:		2-1510 PAYG Withholdings Payable	-\$384.00	

Already Printed Number of Pay Periods: 3

- 10) Click **OK**. The **Select & Edit Employee's Pay** window reappears. If you are paying several employees, repeat steps 8 and 9 for your other employees.
- 11) Continue processing your pay run as you normally do.

For more information about processing holiday wages, see [**Support Note 0813 - Entering Pay Chg including Holiday Wages**](#) .